

Home Health Care Products and Equipment Market in Russia

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Summary

This report briefly reviews the home health care and rehabilitation products and equipment market in Russia. It also analyses government regulations concerning registration, certification and imports of the above products and equipment to Russia, as well as opportunities for U.S. manufacturers and suppliers of home health care and rehabilitation products and equipment.

Russian home health care and rehabilitation products and equipment market has only started to develop in the last five years. Many advanced high-tech home health care products, which are widely spread in the West, have been only recently introduced in Russia. Domestic production of home health care and rehabilitation products and equipment can meet, according to estimates, only 40 percent of the total demand. Imports play a significant role in the market.

The U.S. share of the total Russian imports of home health care products and equipment has been growing steadily over the last five years. Russia does not produce a full variety of home health care products and equipment, which can comply with Western standards. A substantial part of Russian-made home health care products are represented by low-tech products such as manual wheelchairs, crutches, canes, simple bathing aids and lifts for elderly and disabled, tread mills, walking aids, mattresses, bandages, supports and simple orthopedic products. The Russian-made high-tech products are represented by three groups:

- motorized wheelchairs, hydro lifts, and multifunctional beds;
- devices for physical and manual therapy;
- respiratory equipment, including devices for ozone and hypoxia therapy.

Some of the Russian-made devices for physical therapy, ozone and hypoxia therapy do not have analogs abroad. Domestically made electrical wheelchairs can compete with Western analogs. Multifunctional beds and lifts are usually inferior to Western analogs in terms of efficiency, technology and design. The same refers to supports, bandages and orthopedic products. Russia does not produce advanced respiratory equipment such as oxygen concentrators, nebulizers, and air compressors, as well as digital hearing aids. The above products as well as multifunctional beds, electrical wheelchairs, scooters, tread mills and other products can be considered as best prospects for U.S. manufacturers.

In Russia, as in other countries throughout the world, the home has always been the primary environment for taking care of the sick. The average income of the population is still very low (USD 67 per month in 1999), the majority of households can only afford basic first aid medicines and medical devices used for home health care. Advanced sophisticated medical devices are affordable for a limited group of population. The major end-users of home health care products are the disabled, elderly, and patients with asthma

and diabetes. Russia's private health care insurance system is only developing. Home health care equipment and products are funded by a combination of federal and regional budgets, mandatory medical insurance funds, and the patient's own money. In the short run, low cost of home health care products and respiratory equipment have good market potential. In the long run, as the economy improves, high-tech rehabilitation equipment will have better prospects. End summary.

A. MARKET HIGHLIGHTS & BEST PROSPECTS

Market Profile

The Russian statistics do not provide information on the total size of the home health care and rehabilitation products and equipment market. However, judging by such indirect factors as the general growth of the domestic production over the last two years, we can conclude that certain growth of home health care and rehabilitation products and equipment market took place over the same period. Another indirect factor is a rapid introduction of new domestically made home health care products and devices for physical therapy as well as for treatment of respiratory and orthopedic diseases.

Local production of home health care products and rehabilitation equipment and supplies covers only 40 percent of the total market. Specialists anticipate that because of the financial crisis and reduced purchasing power of the population the market share of domestic home health care products and equipment may increase to 45-50 percent in the next five years. While in the West, especially in the United States, the home health care products and services markets are booming, in Russia they have only started to emerge. In Russia in many cases home health care and rehabilitation products are distributed as donations. At the same time, private distribution of home health care and rehabilitation products and equipment is growing rapidly. Distributors of medical equipment get more orders from the population of health care and social protection authorities, which make substantial purchases of home health care products for disabled and diabetes patients. Taking into account the large elderly population in Russia (about 30 million people) and the disabled population (about 8 million people) we can say that home health care has good market potential in Russia in the long run. It is a characteristic feature of the Russian culture that most people would rather receive care within the comfort and familiarity of their own home than hospitals and clinics the majority of which are in rather poor condition.

The share of the imported home health care and rehabilitation products and equipment in the total market is currently 60 percent. According to the State Customs Committee statistics, the imports of home health care products, including devices for massage, respiratory equipment, physical therapy equipment, orthopedic devices, and hearing aids have been growing since 1999-2000 (see statistical table) after significant decrease in 1998 due to economic crisis. The United States is the major supplier of home health care products to Russia. In 1999-2000 the U.S. imports of home health care products and equipment increased by one third (see the statistical table).

Decreasing state support for industrial enterprises for several years has been one of the factors responsible for decreasing per capita income of Russians, and high inflation combined with lower-than expected access to foreign investment had an adverse effect on the Russian economy. The same factors, however, have led to a greatly expanded interest in home health care. The Russian home health care market is very receptive to Western products. Russia imports such types of advanced home health care and rehabilitation products and equipment as wheelchairs, multifunctional beds, hydro lifts, walking aids, oxygen concentrators and nebulizers, modern orthopedic products, hearing aids, etc. There is a particularly large market for devices which are inexpensive and can be used without medical supervision or training.

Total public expenditures for health care at all levels in 2000 are estimated at USD 4.5 billion, or 2.7 percent of the GNP. Of this sum only USD 430, or less than 10 percent, is the Ministry of Health budget. Regional budgets, as well as regional mandatory medical insurance funds, have started to be the major source of public health care spending covering over 90 percent of total expenditures. Per capita public health care expenses are only USD 50 while in the United States they are USD 4,000. Low public health care expenses limit the access of the nation's disabled and elderly to home health care and rehabilitation products.

Russia still lacks a solid legislative basis for regulating its health care industry. A number of laws, including a Law on Health Care Insurance, a Law on Medicines, and a Law on Psychotropic Substances have been adopted recently and improved the understanding of the current health care market and procedures and regulations. At the same time, a Law on Medical Equipment, a Law on Federal Health Care, and a Law on Municipal Health Care are being discussed by the Russian parliament, but have not yet been adopted. This aggravates the health care spending situation because the regions may set the share of budget expenses that are aimed at health care at their own discretion. In some regions, like the Kirov region, health care spending is 33 percent of the total regional budget expenditures. In other regions, like Irkutsk, such spending amounts to only 9.8 percent. Such discrepancies result from the lack of an imposed legislative minimum of budget resources allocated for health care in each region. The Duma and the government are discussing setting the minimum limit at 20 percent.

Statistical Data

HOME HEALTH CARE AND REHABILITATION PRODUCTS & EQUIPMENT

MARKET SIZE TABLE FORMAT (US DOLLARS MILLIONS)

	Last Year 1999	Current Year 2000	Next Year 2001	Projected avg. annual growth rate for following 2 years (2002-03) %

Import Market, including	42.1	50*	NA	17
- Devices for massage, respiratory equipment, Physiotherapeutic equipment	28.9	33*	NA	15
- Orthopedic Devices, Hearing Aids	13.3	17*	NA	20
Local Production	NA	NA	NA	NA
Exports, including	10.3	12*	NA	10
- Devices for massage, respiratory equipment, Physiotherapeutic equipment	1.7	2*	NA	5
- Orthopedic Devices, Hearing Aids	8.6	10*	NA	15
Total Market	NA	NA	NA	NA
Imports from U.S., including	10.9	13.3*	NA	15
- Devices for massage, respiratory equipment, Physiotherapeutic equipment	6.9	7.3*	NA	15
- Orthopedic Devices, Hearing Aids	4.0	6.0*	NA	15
Exchange Rate	27**	29**	NA	

* Estimate

** The dollar exchange rate at the end of the year, for the year 2000 the exchange rate is an estimate.

1998 Import Market Share (Percent for U.S. and Major Competitors)

U.S.	26%;
Germany	24%
Italy	11%
Switzerland	8.3%
Sweden	7%

Estimated Future Inflation Rate: 40%

SOURCES: Customs Committee Foreign Trade Statistics, Moscow, State Customs Committee of the Russian Federation, 1999.

Best Sales Prospects

Many types of home health care and rehabilitation products and equipment are either not produced locally or are produced in insufficient quantities. These products and equipment do not comply with Western quality standards. There is a growing demand for many types of products and equipment in the next three years. The best sales prospects in the Russian home health care equipment and supplies market include:

- wheelchairs, manual, electric, sports and scooters;
- multifunctional beds;
- hydro and other lifts;
- bathing aids;
- walking aids;
- mattresses;
- crutches;
- canes;
- scooters;
- tread mills;
- oxygen concentrators and nebulizers;
- digital aids, audiometers and tympanometers;
- modern orthopedic products;
- seating aids.

In general, the Russian population and health care and social protection authorities prefer to buy new home health care products and equipment, therefore, used products and equipment are not in high demand.

B. COMPETITIVE ANALYSIS

Domestic Production

Russian production of home health care and rehabilitation products and equipment has been developing rapidly over the last years. Several years ago the Russian home health care market was mainly represented by primitive home health care equipment and products. Imports of home health care products were not large. Currently there are about 40 plants in Russia producing various types of home health care products. As the market for home health care products grows, local manufacturers become more attracted to this sector.

Russia generally has a considerable industrial capacity; however, a significant part of it is still not being fully utilized. This is especially true in reference to the former defense enterprises. As government support for defense enterprises and scientific and research institutions declined, these companies started to seek new ways to make full use of their experienced personnel and factories. Many former defense industry enterprises began to produce civil goods, including a number of home health care devices.

Motorized wheelchairs are now produced within the country (at the converted defense enterprises). The following is a list of existing plants that are producing motorized wheelchairs: Ufa plant of metal and plastic goods, Stavtrov automotive tractor plant, Energia Scientific and Production Amalgamation which launched the production of the motorized Incar wheelchair. Motorized wheelchairs are also made at a number of newly created enterprises such as the Russian-American joint venture DAB International in St. Petersburg. Katarzhina is a firm founded by disabled people that specializes in manufacturing of two trademarks: Picnic and Kroshka Ru wheelchairs.

Tread mills, tonometers, ultrasound inhalers, respiratory muscle training equipment, equipment for physical, ozone and hypoxia therapy, sleep therapy devices, orthopedic products are also produced at the domestic enterprises. (See the Key Contacts Section for the list of major local manufacturers of home health care products).

There are numerous examples of successful production of home health care devices at the Russian former defense enterprises. One such example is the Medozones company from Nizhny Novgorod which specializes in production of medical oxygen generators. The company was created by a group of Russian medical scientists in cooperation with the nuclear scientists from the Federal Atomic Center. In response to the growing popularity of ozone therapy the above groups of scientists formed the Russian Association for Ozone Therapy in 1995.

Another example of defense conversion is the production of hearing devices organized by the Istok Audio International Company at a former defense plant in Fryazino, Moscow region. The company uses U.S. equipment and financing.

Third-Country Imports

Third country home health care and rehabilitation products and equipment imports mostly come from Germany (24 percent), Italy (11 percent), Switzerland (8.3 percent) and Sweden (7 percent). Other countries actively importing these products to Russia are the U.K., Czech Republic, Israel, Slovenia, Taiwan, Finland, Poland, Bulgaria, and Japan.

Such third-country companies as German Meyra, Drager and Kendel (wheelchairs), Maico (audiometers), British Rehab and Medical (walking aids and other types of rehabilitation equipment), Japanese A&D (tonometers), Spanish Uribari (wheelchairs), Slovenian Lublyana (wheelchairs) and many others have been very active in the Russian market over the last several years.

U.S. Market Position

In the last five years, the Russian home health care and rehabilitation products and equipment market has been very receptive to U.S. equipment and supplies. The United States is the major supplier of home health care products and equipment to Russia. Modern U.S. home health care products and equipment are widely advertised in industry publications and at medical exhibitions. U.S. products sold in Russia include motorized wheelchairs, hydro lifts, walking and bathing aids, tread mills, orthopedic products, oxygen concentrators and other respiratory equipment.

The following U.S. manufacturers of home health care and rehabilitation products and equipment have been actively increasing their share in the Russian home health care market over the last several years:

Sunrise Medical (broad range of products and equipment);

Chatanooga Group, Inc. (broad range of home health care products);
Oxycon Inc. (oxygen concentrators);
ADCO Hearing Products (hearing aids);
Invacare (rehabilitation and respiratory equipment);
Airsep (respiratory equipment);
Palco Lab (pulse meters);
IDP Inc. (devices for physical therapy);
American Spas (baths for hydro massage);
Dyna Med (first aid kits);
DeVilbiss (oxygen concentrators);
TruFit (orthopedic footwear for diabetes patients);
ITA-MED (back and abdominal supports, support hosiery, maternity products, sports-medical supports, other orthopedic products);
AMRUS Ltd. (orthopedic products);
Mark of Fitness (tonometers);
Biotics (multifunctional beds);
AG Union Corporation (support belts);
Medical Designs (bracing systems);
ACD Inc. (mattresses);
Healthdine (oxygen concentrators);
Zimmer (orthopedic products);
Endless Pools (pools for hydro massage).

Though the volume of sales of those companies in Russia dropped after the August 17, 1998 crisis, the major U.S. home health care product suppliers have not left Russia. Many U.S. medical companies had to reconsider their strategies after the crisis and decided to intervene into the local packaging and manufacturing sector with Russian partners. Foreign investment in local manufacturing is faced with a number of difficulties, including general political instability, lack of incentives and proper protection of foreign investors as well as intellectual property rights protection.

Inadequate protection of intellectual property rights (IPR) is a critical deterrent to foreign investment in Russia and has been a burning issue for foreign businesses, operating in Russia, for years. At the highest levels, Russia has signaled its commitment to protecting IPR: Russia is a signatory to several international agreements that require compliance to international standards of IPR law and enforcement. Russia has also made significant progress in introducing the laws to ensure IPR compliance.

At the same time Russia's economic transition, accompanying government debt and the associated wide spread plunge in living standards tends to reduce the urgency with which the issue is viewed by some on the Russian side. Limited budgetary resources weaken the effectiveness of official organs of enforcement. Needless to say, long-term improvements in Russia's economic situation will certainly have some positive impact on IPR observance. However, short-term actions must be taken now to attract and maintain investment in Russia.

However, there are several examples of successful investment projects in local manufacturing of medical devices, including home health care products. One such example is the activities of Trufit Orthopedics Manufacturing Corporation. Trufit has been in business in New York for over fifty years. Trufit is one of the largest providers of custom orthopedic shoes and foot orthotics in America. Their products are used for people with high-risk feet such as diabetes, arthritis, amputations, birth defects, and traumatic injuries. Trufit shoes are hand made by skilled craftsmen. The company was not able to find this type of skilled force in the United States and was forced to look for labor outside the U.S. This search led them to Russia which has qualified shoemakers unemployed. The company started to work in the Russian market in 1994 and has been growing steadily since that time. They established good relations with the Russian Ministry of Labor and Social Protection and have obtained all the licenses necessary to manufacture their products and to conduct their business.

Now they have a representative office and medical care center in Moscow at 28/6 Pokrovka Street, an 80,000 square feet manufacturing facility producing orthopedic footwear for diabetes patients in Lytkarino, Moscow region, and an office at 6/8 Zverinskaya Street in St. Petersburg. The company employs 180 Russians. The company's project in Russia has a status of a socially important project. It helps diabetes patients and increases domestic employment. For Trufit hiring local labor is a significant cost saving factor.

Education campaigns targeted at doctors are a very important technique for expanding the market share in Russia. Working with doctors through medical research institutes and clinics could help U.S. companies introduce their products to the Russian market and teach Russian doctors how to use new equipment and products.

A technique which might help new-to-market U.S. companies enter the Russian home health care equipment and products market is advertising in medical equipment journals and magazines. (Refer to Key Contacts at the end of this report for the listing of major medical magazines in Russia).

C. END-USER ANALYSIS

The major end-users of the home health care products in Russia are invalids, elderly, and diabetes and asthma patients.

Radical economic and political reforms in Russia opened up access to the information about the life of disabled people in the West who for years have been abandoned in Russia. The basic notion accepted in the West that disabled people are equal members of society and that they should be treated equally for years has not been the same mindset in Russia. In the middle of the 1990s the Russian government decided to change the society's approach towards invalids. The Russian government statistical organizations were tasked to collect information about the number of invalids in the country. Before 1995 such statistics was not available. The statistics which the government agencies managed to collect showed that in the middle of the 1990s there were 8 million disabled

people in Russia, or 6 percent of the population. These sad statistics encouraged all government agencies to work together to help solve problems which the disabled people are confronted with on a daily basis. As a result of these efforts, a Law on the Social Protection of the Disabled was adopted in Russia in November 1995. The Law for the first time in the history of Russia laid a legal basis for the government policy to secure equal rights according to the internationally accepted standards for the disabled in civil, economic and political spheres. More recent sources state that the number of invalids in Russia is currently 10 million.

The goals, which have been proclaimed by the Law, could not be achieved without creating the domestic rehabilitation industry. This process started in 1995 and led to a significant growth of local production of the home health care equipment sector, especially wheelchairs (See the Domestic Production Section). At the same time a lot of Western wheelchairs appeared in the market. According to the estimates, one million wheelchairs are necessary in order to satisfy the needs of the disabled for the next five years. The annual need for wheelchairs is therefore 200,000 units. In reality, the available funding permits to sell only 70,000 units a year which only covers 30 percent of the need. At present, 700,000 disabled are in need of wheelchairs.

Russian invalids are composed of several groups: invalids from birth and childhood, war invalids, invalids with diseases and invalids due to accidents. Invalids generally have a number of privileges which include access to free or partially reimbursed health coverage. This coverage includes orthopedic footwear, hearing aids and dental and limb prostheses. Invalids also have rights to get free wheelchairs covered by the government. The Russian Ministry of Labor and Social Development is responsible for implementation of the social policy as well as laws and regulations concerning disabled. Territorial divisions of the Ministry of Labor and Social Development in the regions are in charge of procurement and supply of equipment and products for disabled.

The number of disabled has been growing recently due to the war in Chechnya. According to the March 14, 2000 edition of the Itogi magazine, up to 2 percent of military taking part in the war become disabled. It means that the last military action in Chechnya in 1999-2000 called the second Chechen war has resulted in 4,000 disabled. Veterans of the second Chechen war still do not have the same privileges as the First Chechen War (1994) veterans who have the same status as the Second World War veterans. It means they do not have full access to free wheelchairs, prostheses and other supplies for disabled. The benefits which the Second World War and the First Chechen War veterans are given is still not sufficient to cover the real needs that are required.

Another large category of end-users is the elderly. Out of over 146 million people inhabiting Russia 30 million are pensioners: women over 55 and men over 60. Therefore, the market potential for home health care products and equipment is very high. In the past years with the rise of health care costs the public has placed a renewed emphasis on self-care supplies and products. Unfortunately, the majority of the population who is in need of these products cannot afford them. The ability of the population to buy home health care products varies from one region to another. In major Russian cities as

Moscow and St. Petersburg the purchasing power of the population is usually relatively higher than in general in Russia.

Russia has 10 million diabetes sufferers. A significant percentage of lower limb amputation occurs among patients with diabetes. Early detection of diabetes and its proper care is crucial to lower the incidence of complications and amputations. Prevention of foot infection which is the major cause of hospitalization and foot amputations could be avoided by early detection of diabetes. Special diabetes footwear is very important for healing the foot diseases related to diabetes and avoiding complications. Thus, diabetes foot sufferers form an important market for orthopedic footwear manufacturers.

D. MARKET ACCESS

Import Climate

Current Russian legislation is not a significant barrier to importers of home health care products and equipment. Customs duties for these equipment and products are currently 5 percent. Home health care products may be exempt from the 20 percent VAT if they have proper conformity certificates.

The major documents necessary for importing home health care products and equipment into Russia are a registration certificate from the Ministry of Health and a certificate of conformity with safety and quality norms (GOST R certificate) issued by the State Committee for Standardization, Metrology and Certification, or Gosstandart. The customs authorities permit imports and charge import duties based on classification of goods. Classification is done according to the list of products which are subject to obligatory conformity certification. These lists are compiled by Gosstandart. The GOST R certificate is issued by accredited testing centers. Products that have certificates of conformity are exempt from the 20 percent VAT.

In the majority of cases certificates of conformity for medical equipment and devices are issued after the product has undergone registration by the Ministry of Health. This registration proves that the product can be used for medical treatment in Russia and that it is clinically safe. Clinical safety is usually backed by clinical trials. In general, home health care products and equipment can be divided into two groups: products and equipment used primarily for medical treatment and devices having broader usage, including disease prevention, rehabilitation, massage and cosmetology. For the first group registration is necessary because by law medical equipment which is not registered in Russia cannot be purchased and used in Russia. Registration also eliminates involved risks for the doctors who are using such equipment for treatment. It also allows doctors and distributors to obtain a certificate of conformity for the medical equipment. It is impossible to obtain a certificate of conformity without registering with the Ministry of Health. The certificate of conformity provides VAT exemption. For the home health care goods with wider usage registration with the Ministry of Health is not necessary

unless these products are supposed to be used for medical treatment only. At the same time certification of such products is obligatory.

Registration of medical equipment and devices:

According to Order N23, dated January 23, 1996, issued by the Russian Ministry of Health, it is prohibited to purchase and use foreign-made medical equipment in Russia without it being registered with the Ministry of Health. Upon registration, all imported medical equipment and devices are added to the National Register of medical equipment allowed for use in medical treatment in the Russian Federation.

In December 1998, the Ministry of Health issued an Instruction on Registration Procedures for Foreign-Made Medical Equipment and Devices, which introduced several changes into the registration process. Under the new instruction, the registration procedure is governed and controlled by the Department of State Control over Quality, Efficiency, and Safety of Drugs and Medical Equipment of the Ministry of Health. Also, by new rules, the applicant must submit more documents than before, and most of them should be translated into Russian. This means additional expenses for the manufacturer or its authorized Russian representative. According to the instruction, the number of tests the product must undergo is significantly increased, resulting in a longer registration procedure. Before being considered for actual registration and necessary technical and clinical trials, the product documentation must be scrutinized by the Council for New Medical Equipment within the Ministry of Health. The Council then decides whether the product should be recommended for registration. If the Council decides that foreign products have analogs in Russia, it may deny registration of the foreign product.

As the registration procedure includes actual tests on the equipment or device, a sample of this equipment or device should be imported into Russia for registration purposes. In order to be able to bring a device into the country the manufacturer or its authorized representative should apply to the Ministry of Health and get the appropriate permission to present at the customs point. In case of negative resolution, the equipment has to be exported back to the country of origin.

The registration procedure involves several stages such as technical, safety, toxicology, hygienic and clinical tests. Testing centers accredited by the Ministry of Health perform technical and toxicology tests. The Ministry of Health has lately been actively implementing obligatory hygienic testing and obtaining hygienic conclusions for practically all medical equipment and devices. The Department of State Sanitary and Epidemiological Surveillance of the Ministry of Health issues hygienic conclusions. Measurement devices undergo special tests to prove that they can be used as measurement means. Clinical tests are performed by healthcare institutions authorized by the Ministry of Health upon completion with positive results of respective technical and toxicology tests as well as hygienic assessment.

If a foreign manufacturer performs registration, it has to submit a number of documents to the Russian Ministry of Health. They include the application, technical description of

the product, price information, operating instructions in Russian, copies of registration certificates in the country of origin and third countries and others. If registration is performed by an authorized Russian company, it has in addition to the above mentioned documents to submit Power of Attorney from the manufacturer notarized by the Russian Consulate office in the country of manufacture.

The applicant covers insurance payments for risks of adverse effects of the clinical tests on test participants. The whole procedure of obtaining a registration certificate may take from 3 to 6 months. In some cases it takes even longer to register the medical equipment depending on the character and scope of the tests.

The Ministry of Health registration certificate is issued by the State Department for Control over Quality, Safety and Efficiency of Drugs and Medical Equipment within the Ministry. Contact information for the Department is as follows:

Mr. Ramil Khabriev, Head
State Department for Control over Quality, Safety and Efficiency of Drugs and Medical Equipment
Ministry of Health of Russia
18/20 Vadkovsky Per.
Moscow 101432, Russia
Tel.: 7 (095) 973-1394
Fax: 7 (095) 973-1674

Registration forms may be obtained from the Department of Testing and Registration of New Foreign Medical Equipment of the Ministry of Health. The Department also informs the applicant about the types and scope of tests for certain types of equipment, nominates testing laboratories which will perform the tests, executes control over testing laboratories and issues the registration certificates. Following is the contact information for the Department:

Mr. Aleksander Karelin, Head
Division for Organization of Testing of New
Foreign Medical Equipment
Ministry of Health of Russia
18/20 Vadkovsky Per.
Moscow 101432, Russia
Tel.: 7 (095) 973-1993/2706/1568
Fax: 7 (095) 973-2706

Registration and clinical trials are conducted at a cost of 15 percent of the equipment price and require temporary provision of equipment for testing (generally for 2-3 months). For expensive, complex equipment like anesthetic and respiratory devices, artificial blood circulation devices, accelerators, computer tomographs, laser equipment, dental complexes, etc., registration fees might be considerable. For disposable systems

and smaller devices like test kits, sutures, or surgical gloves, certification costs varies from USD 200 to USD 2,500. Registration certificates must be renewed every two years.

Certification of medical equipment and devices

Imported medical equipment and devices should conform to Russian quality and safety standards, which are set by Gosstandart. Gosstandart ensures product conformity through a system of end product certification.

Russia has started to gradually introduce a new industry standard which fully corresponds to GMP (Good Manufacturing Practices). In accordance with the plan for new standards introduction, all manufacturers which utilize new or reconstructed production facilities are obliged to produce drugs in full compliance with GMP starting June 2000, domestic Manufacturers of pharmaceuticals must adapt their production facilities and technologies to the new standard before 2005, and manufacturers of ingredients before 2008. With full introduction of the new system Russia will have to introduce new certification procedures. So far adherence to GMP is not accepted as confirmation of product conformity. Rather, manufacturers must submit finished products for testing to an accredited third party certification organization. Based on test protocols and results, a certificate of conformity may be issued on a single item or on a lot. Serial production certificates are issued for a maximum of three years, and in the case of serial production, follow-up testing is generally required.

Gosstandart has made significant efforts towards bringing Russian standards into compliance with international ones and has relied considerably on ISO and IEC standards in doing so. The existing system of accredited certification organizations remains in its first stages of development and, according to the American Chamber of Commerce in Russia, some companies presenting high-tech equipment for testing have experienced difficulties in finding a certifying organization with sufficient technical expertise. Likewise, procedures for accepting internationally issued certificates remain underdeveloped.

Gosstandart authorizes a number of national testing centers to issue certificates of conformity for medical equipment and products, including home health care. A list of the accredited testing centers which issue GOST R certificates for medical equipment can be obtained from:

Ms. Galina Minyailik, Chief Expert on Medical Equipment Certification
Expert on Accreditation of Testing Laboratories
Gosstandart (Russian Standards Committee)
9 Leninsky Prospekt
117049 Moscow, Russia
Tel.: 7 (095) 236-3177
Fax: 7 (095) 236-6231

Following is the contact information for two major accredited testing centers for medical equipment in Moscow:

Vladimir A. Viktorov, Director
VNIIMP-VITA Joint Stock Company
1 Timiryazevskaya Ul.
Moscow 125422, Russia
Tel.: 7 (095) 211-0910/0710
Fax: 7 (095) 200-2313

Boris I. Leonov, General Director
NPO Ekran
3 Kasatkina Ul.
Moscow 1290301, Russia
Tel.: 7 (095) 187-2807
Fax: 7 (095) 187-3734

The Ministry of Health has introduced mandatory hygiene assessment for many products, including medical equipment and devices. The Center of Hygienic Standards and Certification of the Department for Sanitary and Epidemiological Surveillance of the Ministry of Health issues hygiene conclusions based on certain tests. Obtaining a hygiene conclusion from the Center of Hygienic Standards and Certification has become a prerequisite for issuing a GOST R certificate. The hygiene conclusion should be submitted along with other documents to the Gosstandart testing centers in order to get the GOST R certificate of conformity. The contact information for the Center of Hygienic Standards and Certification is as follows:

Ludmila M. Simkalova, Director
Center of Hygienic Standards and Certification
Department for Sanitary and Epidemiological Surveillance of
Ministry of Health of the Russian Federation
18/20 Vadkovsky Per., Office 5
Moscow 103055, Russia
Tel.: 7 (095) 973-1571
Fax: 7 (095) 973-1976

As registration and certification procedures involve direct personal contact with respective Russian government entities as well as substantial time and paperwork, U.S. companies are recommended to effectuate both procedures either through an accredited representative office in Russia or through a hired Russian or foreign agent or distributor.

Distribution/Business Practices

Distribution of home health care products and equipment is controlled by a limited number of well-established private distributors. At the same time there are a number of small- and medium-sized distributors especially in the regions, which add an additional

layer to the distribution chain. However, the market is dominated by a handful of large distributors. They usually have their headquarters in Moscow and operate through Russia via agent's network. Distributors sell major types of home health care equipment directly to the regional committees of social protection of the population. Significant portions of home health care products are sold through retail network Medtekhnika (Medical Equipment) shops and pharmacies. The latter have specialized in the sale of cosmetics, toiletries, and household products in recent years, but have begun adding home health care items to their offerings in response to their perception that this will be a new area of demand for retail goods. Both pharmacies and distributors are advertising the availability of home health care products in newspapers, professional health-oriented journals, mass-market magazines, and on television.

Russia generally lacks public understanding of the nature of home health care equipment and supplies. For example, at medical trade shows only 10 percent of the health care equipment are promoted as suitable for home use. However, much larger proportion of exhibits at those shows can be recommended for home use. It is not surprising because there appears to be no mechanism for the provision of professional care at home. Family members or paid domestic workers are the typical providers of home care. Medical services are provided at clinics and hospitals.

Searching for a reliable business partner in Russia should be a primary goal for a new-to-market exporter of home health care and rehabilitation products and equipment. The majority of U.S. home health care products manufacturers do not open official representative offices in Russia, but rather work through established Russian distributors which help to save on costs. As the process of registration and certification of products and equipment in Russia is rather complicated and cannot be accomplished from the United States, the best way to do it is to place the responsibility for it on a qualified distributor acting on behalf of the U.S. manufacturer. The best way to find a quality distributor is through participation in major medical conferences and exhibitions in Russia (refer to the Trade Promotion Events List).

Financing

There are two major government sources of funding for medical purchases: budget allocations from federal and local budgets and federal and regional Mandatory Medical Insurance (MMI) funds. In Russia, employer's payroll contributions to the MMI account represent 3.6 percent of salaries (3.4 percent to the local fund and 0.2 percent to the federal). Employer payments for mandatory health insurance are excluded from their taxable income. In Western Europe, by comparison, payroll contributions to analogous funds range from 8 to 12 percent of the payroll. Actual collections of regional MMI funds are only 60 to 90 percent of budgeted revenues; in addition, MMI monies are often used for items other than health care.

More than 100 million Russians are covered by free, state-financed medical insurance policies, which can turn away no applicant. One third of the 2,000 insurance companies in Russia work with the state on the mandatory medical insurance programs.

One more growing source of health care expenses is patient's out-of-pocket money and private insurance. According to different estimates, such expenses reach from 50 to 100 percent of all of the government health care expenditures which means that private expenditures for health care products and services are from USD 2.3 to 4.5 billion. It is difficult to exactly calculate the amount of money spent on home health care products, but it is evident that this amount has been growing in the last years.

The Russian public health care system has shrunk drastically in coverage since the demise of the USSR. Invalids of different categories by the law have a right to get wheelchairs, orthopedic and prosthetic goods free, but because of a scarce budget and limited MMI funds these items have not been provided. Disabled are forced to cover these costs and to purchase necessary goods and treatments.

Some Russians, especially inhabitants of large cities have got access to private insurance programs. However, these programs usually do not cover the purchase of home health care equipment and cover only part of the home health care services.

KEY CONTACTS

Major home health care and rehabilitation products and equipment distributors in Moscow:

1. Eton Ltd.

Sergey Ye. Peshkov

65 Gilyarovskogo Ul.

VNII Almaz (for Eton)

Tel//Fax: 7 (095) 288-9809, 778-5943

Ingalators, Nebulizers

2. DON

74 Michurinsky Prospect

Moscow 117602, Russia

Tel.: 7 (095) 430-8008/07

Fax: 7 (095) 430-8072

Wheelchairs made by the U.S. company Omni, Bandages, Supports, Orthopedic Products

3. Nika-Med

6, kor. 2 Novopeschanaya Ul.

Moscow 125057, Russia

Tel.: 7 (095) 157-7040

Fax: 7 (095) 157-2391

Back and abdominal supports, other orthopedic products, maternity products

4. Assomed

2A Moskvoretskaya

Moscow 109240
Tel.: 7 (095) 298-5955/3229/3166
Fax: 7 (095) 298-1159, 298-5922
E-mail: assomed@ditm.ru
www.medcom.ru/assomed
Tonometers, glukometers, hearing aids

5. K & K Ltd.
P.O. Box 158
Moscow 119048, Russia
Tel.: 7 (095) 245-7334
Fax: 7 (095) 245-7369
Blood pressure measurement devices

6. LifeCore International
Ludmila Agapitova
General Director
P.O. 37
Moscow 123459, Russia
Tel./Fax: 7 (095) 948-6902
E-mail: lifecore@aha.ru
AirSep, Invacare distributor
Wheelchairs, beds, rehabilitation equipment, respiratory equipment

7. Medium Plus
7 Ivankovskoye Shosse
Moscow 123367, Russia
Tel.: 7 (095) 490-0497, 280-4577
Fax: 7 (095) 490-5590, 280-8877
E-mail: medium-plus@mtu-net.ru
Web site: www.mtu-net.ru/medium
Equipment for physical therapy

8. Tsentralnaya Meditsinskaya Baza Ltd.
7 Tschelkovskoye Shosse
Moscow, Russia
Tel./Fax: 7 (095) 460-4348
E-mail: ocmb@mail.ru
Web site: www.cmb.ru

9. Vladimir A. Viktorov, Director
VNIIMP-VITA Joint Stock Company
1 Timiryazevskaya Ul.
Moscow 125422, Russia
Tel. 7 (095) 211-09-10
Foreign Relations Department: 7 (095) 211-07-10

Fax: 7 (095) 200-2213

Wide spectrum of home health care equipment

9. Igor F. Rybakov, General Director

Rusoptimed Joint Stock Company

6 Nauchny Proezd, 4th floor

Moscow 117828, Russia

Tel.: 7 (095) 120-21-16, 120-91-14, 120-0016, 334-8103

Fax: 7 (095) 120-8000, 121-2116

Wide spectrum of home healthcare equipment

10. Yuri Ya. Vanovsky

General Director

Zdravexport Foreign Trade Association

21 Novy Arbat

Moscow, Russia

Tel.: 7 (095) 244-2258

Fax: 7 (095) 244-3850/4552

Wide range of home health care equipment

11. Boris I Leonov, General Director

NPO Ecran

3 Kasatkina Ul.

Moscow 129301, Russia

Tel.: 7 (095) 187-2807

Fax: 7 (095) 187-3734

Wide range of home health care equipment

12. Yuri Schetinsky, Deputy General Director

Rosmedtehnika

15 Kropotkinskaya nab.

Moscow 103012, Russia

Tel.: 7 (095) 201-2543, 201-2705/201-2736 (Valentina Petrovna Semigina)

Fax: 7 (095) 291-0898

Wheelchairs

13. Dmitry A. Zateitchikov, President

Medexpert Joint Stock Company (Division of ATM JSC)

4 Kominterny Ul.

Moscow 129344, Russia

Tel.: 7 (095) 184-8401

Fax: 7 (095) 184-8018

14. Anatoly Potapov, Head of Marketing and Sales Department

Advanced Medical Systems

3 Marshala Zhukova Prospekt

Moscow 123308, Russia
Tel/Fax: 7 (095) 191-4460/3201
E-mail: admes@postman.ru

15. Komlekt-Service Closed Joint Stock Company
7, Building 3 Vorotnikovsky Per.
Moscow 103006, Russia
Tel.: 7-095-209-3731, 299-4064
Fax: 7-095-209-3731, 299-4064

16. Dmitry A. Starodubtsev, Director
Zdorovaya Semia International Center
12 Vorontsovo Pole
Moscow 103064, Russia
Tel.: 7-095-917-2567/9421
Fax: 7-095-917-3731

17. Medicina dlya Vas Trading House
64 Nizhnyaya Maslovka Ul.
Moscow 105203, Russia
Tel.: 7-095-465-7245/7840/6576
Fax: 7-095-965-5466

18. Moscow-Amros Closed Joint Stock Company
3, 1 Rybinskaya Ul.
Moscow 107113, Russia
Tel.: 7-095-264-3826/3975
Fax: 7-095-264-3877

Major local manufacturers of home health care products:

1. Gennady N. Posokhov, Director
Ufa Plant of metal and plastic goods
Vysokovolt'naya Ul. Ufa 450069, Bashkortostan, Russia
Tel.: 7 (3472) 15-33-81/15-33-31
Wheelchairs

2. Zlatoust Medical Plant
1, otd. 271 Parkovy Proezd
Zlatoust, Chelyabinsk Region 456208, Russia
Tel.: 7 (35136) 2-12-01, 3-18-11
Multifunctional beds

3. Novye Meditsinskiiye Technologii Closed Joint Stock Company
P.O. Box 53
Moscow 115598, Russia

Tel./Fax: 7 (095) 417-6579, 145-3048

E-mail: anna@auver.ru

Web site: www.auver.ru/~nmt

Devices for physical therapy

4. INKOM Scientific and Industrial Enterprise

P.O. Box 23

Moscow 105095, Russia

Tel.: 7 (095) 141-5386, 263-6160

Fax: 7 (095) 141-5386, 201-3417

Sleep therapy devices

5. Medozones

150 Gorky Street

Nizhny Novgorod 603000, Russia

Tel./Fax: 7 (8312) 358-200/358-212

E-mail: pov@infotel.nnov.su

Respiratory and ozone therapy devices

6. Bio-Nova NTO

Moscow

Tel./Fax: 7 (095) 976-8284

E-mail: bionova@aha.ru

Hypoxia therapy equipment

7. Dalnyaya Svyaz State Enterprise

34 Petrogradskaya nab.

St. Petersburg 197046, Russia

Tel.: 7 (812) 233-0670/5502

Hearing aids

8. Pavel N. Nepokoychitsky, General Director

Soyuzmedservice Joint Stock Company

Box 579

16 Timura Frunze Ul.

Moscow 119021, Russia

Tel.: 7 (095) 246-7742

Fax: 7 (095) 246-7833

Hearing aids

9. Elektron NPO

68 Morisa Toresa Ul.

St. Petersburg 194223, Russia

Tel.: 7 (812) 552-2809, 269-3000

Hearing aids

10. Ritm Moscow Plant
81 Dmitrovskoye Shosse
Moscow 127238, Russia
Tel.: 7 (095) 487-1594, 481-4360, 487-1605, 480-7780
Fax: 7 (095) 487-1594, 480-7614
Hearing aids

11. Victor L. Yermakov, Director
Tver Prosthetic and Orthopedic Plant
21 A Ordzhonikidze St.
Tver 170037, Russia
Tel.: 7 (0822) 36-26-32, 36-35-62
Tel./Fax: 7 (0822) 36-59-10
Orthopedic goods

12. Obninsk Prosthetic and Orthopedic Plant
214 Lenina Prospekt
Obninsk 249020, Russia
Tel.: 7 (08439) 4-38-48
Tel./Fax: 7 (08439) 3-29-73
E-mail: kvs@obninsk.com
Orthopedic goods

13. TSITO Moscow State Experimental Enterprise
10 Priorova Ul.
Moscow 125299, Russia
Tel.: 7 (095) 450-3911, /2852/4394
Fax: 7 (095) 450-4186
Prostheses and other orthopedic goods

14. Moscow Prosthetic and Orthopedic Enterprise
17A Korovinskoye Shosse
Moscow 127412, Russia
Tel.: 7 (095) 489-1092, 488-0083
Fax: 7 (095) 488-4475
Prostheses and other orthopedic goods

15. Volgograd Prosthetic and Orthopedic Plant
4 Barrikadnaya Ul.
Volgograd 400074, Russia
Tel.: 7 (8442) 44-22-30
Prostheses and other orthopedic goods

16. Kostroma Prosthetic and Orthopedic Plant
46A Tsentralnaya Ul.
Moscow 156014, Russia

Tel.: 7 (0942) 51-68-81,51-69-27
Prostheses and other orthopedic goods

17. Arkhangelsk Prosthetic and Orthopedic Plant
55 Dachnaya Ul.
Arkhangelsk 163015, Russia
Tel.: 7 (81800) 1-25-17
Prosthesis and other orthopedic goods

18. Syktyvkar Prosthetic and Orthopedic Plant
118 Pushkina Ul.
Syktyvkar, Komi Republic 167002, Russia
Tel.: 7 (818837) 4-25-04
Prosthetic and other orthopedic goods

19. Energia Scientific and Production Amalgamation
4A Lenina Ul.
Korolev, Moscow Region 141070
Tel.: 7-06-513-7516/8521/7357/8414
Fax: 7-095-187-9877/8620
Orthopedic goods

20. Rybinskiye Motory
163 Lenina Ul.
Rybinsk, Yaroslavl Region 152903, Russia
Tel.: 7-0855-24-31-83/24-36-26
Tel./Fax: 7-0855-21-31-08
Fax: 7-0855-26-23-98
Orthopedic goods

21. Victor L. Yermakov, Director
Tver Prosthetic and Orthopedic Plant
21 A Ordzhonikidze St.
Tver 170037, Russia
Tel.: 7-0822-36-26-32, 36-35-62
Tel./Fax: 7-0822-36-59-10
Orthopedic products

Medical device publications:

1. Medical Business
23-1 Bratskaya Ul.
Office 153
Moscow, Russia
Tel./Fax: 7 (095) 368-4703

2. Meditsinskaya Kartoteka
Tel.: 7 (095) 250-8940/8841, 472-7819
E-mail: medka@aha.ru
Web site: www.medka.da.ru
www.medi.ru

Trade Promotion Opportunities:

1. BOLNITSA'2000 (HOSPITAL'2000)

DATE: September 25-28, 2000

PRODUCTS: Medical equipment and pharmaceuticals, hospital and rehabilitation equipment

VENUE: Lenexpo Exhibition Center in St. Petersburg

ORGANIZER: Primexpo

103 Bolshoy Prospekt, V.O.

St. Petersburg 119106, Russia

Tel.: 7-812-119-5166

Fax: 7-812-119-5135

E-mail: strax@primexpo.spb.ru

2. ZDRAVO-OKHRANENIYE'2000 (10th International Health Care Exhibition)

DATE: November 28-December 2, 2000

PRODUCTS: Broad range of medical equipment and supplies, pharmaceuticals and medical technologies

VENUE: Expocentr on Krasnaya Presnya, Moscow, Pavilion 2,3, 6

ORGANIZERS:

AO Expocentr, Firm Mezhevystavka

14 Krasnopresnenskaya nab.

Moscow 123100, Russia

Tel.: 7-095-255-3760

Fax: 7-095-205-6055

E-mail: gorb@expocentr.ru

Web site: <http://www.expocentr.ru>

Contact: Alla Gorbaneva

L&A Exhibitions and Conferences/ITE Group

Contact in Moscow:

18, Stroyenie 3 Dolgorukovskaya Ul.

Moscow 103006, Russia

Tel.: 7-095-935-7350

Fax: 7-095-935-7351

E-mail: main@la.ru

Web site: www.la.ru

3. MEDTECHNIKA'2001 – International Annual Exhibition
of Medical Equipment in Moscow

DATE: May 28-June 1, 2001

PRODUCTS: Broad range of medical equipment

VENUE: Epocentr on Krasnaya Presnya Exhibition Center, Moscow

ORGANIZERS:

ZAO Expocentr, Firm Mezhvystavka, Pavilion 4 and Forum

14 Krasnopresnenskaya nab.

Moscow 123100, Russia

Tel.: 7-095-255-3760

Fax: 7-095-205-6055

E-mail: gorb@expocentr.ru

Web site: <http://www.expocentr.ru>

Contact: Alla Gorbaneva

L&A Exhibitions and Conferences/ITE Group

Contact in Moscow:

18, Stroyenie 3 Dolgorukovskaya Ul.

Moscow 103006, Russia

Tel.: 7-095-935-7350

Fax: 7-095-935-7351

E-mail: main@la.ru

Web site: www.la.ru

4. PUBLIC HEALTH CARE OF SIBERIA

DATE: May 2001 (tentative)

PRODUCTS: medical equipment, pharmaceuticals, medical services

VENUE: Novosibirsk, Russia

ORGANIZER: Siberian Fair

220/10 Krasny Prospekt

Novosibirsk 630049, Russia

Tel.: 7-3832-26-98-01, 10-62-90, 10-62-92

Fax: 7-3832-25-98-45

E-mail: welcome@sibfair.su

Web site: www.sibline.ru/fair/eng/structure

5. BOLNITSA'2001 (HOSPITAL'2001)

DATE: September 25-28, 2001

PRODUCTS: Medical equipment and pharmaceuticals, hospital and rehabilitation equipment

VENUE: Lenexpo Exhibition Center in St. Petersburg

ORGANIZER: Primexpo

103 Bolshoy Prospekt, V.O.

St. Petersburg 119106, Russia

Tel.: 7-812-119-5166

Fax: 7-812-119-5135

E-mail: strax@primexpo.spb.ru

6. ZDRAVO-OKHRANENIYE'2001 (11th International Health Care Exhibition)

DATE: December 3-7, 2001

PRODUCTS: Broad range of medical equipment and supplies, pharmaceuticals and medical technologies

VENUE: Expocentr on Krasnaya Presnya, Moscow, Pavilion 2,3, 6

ORGANIZERS:

AO Expocentr, Firm Mezhvystavka

14 Krasnopresnenskaya nab.

Moscow 123100, Russia

Tel.: 7-095-255-3760

Fax: 7-095-205-6055

E-mail: gorb@expocentr.ru

Web site: <http://www.expocentr.ru>

Contact: Alla Gorbaneva

Thank you for filling out the following survey.

ISA Customer Satisfaction Survey

U.S. Department of Commerce

* International Trade Administration*

The Commercial Service

The U.S. Department of Commerce would appreciate input from U.S. businesses that have used this ISA report in conducting export market research. Please take a few moments to complete the attached survey and fax it to 202/482-0973, mail it to QAS, Rm. 2002, U.S. Department of Commerce, Washington, D.C. 20230, or Email: Internet[Opfer@doc.gov].

* * * About Our Service * * *

1. Country covered by report: _____

Commerce domestic office that assisted you (if applicable): _____

2. How did you find out about the ISA service?

___ Direct mail

___ Recommended by another firm

___ Recommended by Commerce staff

___ Trade press

___ State/private newsletter

___ Department of Commerce newsletter

___ Other (specify): _____

3. Please indicate the extent to which your objectives were satisfied:

- 1-Very satisfied 2-Satisfied
3-Neither satisfied nor dissatisfied
4-Dissatisfied 5-Very dissatisfied
6-Not applicable

- ☐ Overall objectives
☐ Accuracy of information
☐ Completeness of information
☐ Clarity of information
☐ Relevance of information
☐ Delivery when promised
☐ Follow-up by Commerce representative

4. In your opinion, did using the ISA service facilitate any of the following?

- ☐ Decided to enter or increase presence in market
☐ Developed an export marketing plan
☐ Added to knowledge of country/industry
☐ Corroborated market data from other sources
☐ Decided to bypass or reduce presence in market
☐ Other (specify): _____

5. How likely would you be to use the ISA service again?

- ☐ Definitely would
☐ Probably would
☐ Unsure
☐ Probably would not
☐ Definitely would not

6. Comments:

* * * About Your Firm * * *

1. Number of employees: ☐ 1-99 ☐ 100-249 ☐ 250-499
☐ 500-999 ☐ 1,000+

2. Location (abbreviation of your state only): _____

3. Business activity (check one):

- ☐ Manufacturing
☐ Service
☐ Agent, broker, manufacturer's representative
☐ Export management or trading company
☐ Other (specify): _____

4. Export shipments over the past 12 months:

- ☐ 0-1 ☐ 2-12 ☐ 13-50 ☐ 51-99 ☐ 100+

May we call you about your experience with the ISA service?

Company name: _____

Contact name: _____

Phone: _____

Thank you--we value your input!

This report is authorized by law (15 U.S.C. 1512 et seq., 15 U.S.C. 171 et seq.). While you are not required to respond, your cooperation is needed to make the results of this evaluation comprehensive, accurate, and timely. Public reporting burden for this collection of information is estimated to average ten minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Reports Clearance Officer, International Trade Administration, Rm. 4001, U.S. Dept. of Commerce, Washington, D.C. 20230, and to the Office of Information and Regulatory Affairs, Office of Management and Budget, Paperwork Reduction Project (0625-0217), Washington, D.C. 20503.

FORM ITA 4130P-I (rev. 5/95)

OMB. No. 0625-0217; Expires 05/31/2

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ISA Customer Satisfaction Survey

U.S. Department of Commerce * International Trade Administration * The Commercial Service

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0973, or mail it to QAS, Rm. 2002, U.S.

Department of Commerce, Washington, D.C. 20230.

* * * About Our Service * * *

1. Country covered by report: _____

Commerce domestic office that assisted you (if applicable): _____

2. How did you find out about the ISA service?

- ☐ Direct mail
- ☐ Recommended by another firm
- ☐ Recommended by Commerce staff
- ☐ Trade press
- ☐ State/private newsletter
- ☐ Department of Commerce newsletter
- ☐ Other (specify): _____

3. Please indicate the extent to which your objectives were satisfied:

- 1
Very satisfied
- 2
Satisfied
- 3
Neither satisfied nor dissatisfied
- 4
Dissatisfied
- 5
Very dissatisfied
- 6
Not applicable

- ☐ Overall objectives
- ☐ Accuracy of information
- ☐ Completeness of information
- ☐ Clarity of information
- ☐ Relevance of information
- ☐ Delivery when promised
- ☐ Follow

up by Commerce representative

4. In your opinion, did using the ISA service facilitate any of the following?

- ☐ Decided to enter or increase presence in market
- ☐ Developed an export marketing plan
- ☐ Added to knowledge of country/industry
- ☐ Corroborated market data from other sources
- ☐ Decided to bypass or reduce presence in market
- ☐ Other (specify): _____

5. How likely would you be to use the ISA service again?

- ☐ Definitely would
- ☐ Probably would
- ☐ Unsure
- ☐ Probably would not
- ☐ Definitely would not

6. Comments:

* * * About Your Firm * * *

1. Number of employees: __1

99 __100

249 __250

499 __500

999 __1,000+

2. Location (abbreviation of your state only):_____

3. Business activity (check one):

__Manufacturing

__Service

__Agent, broker, manufacturer's representative

__Export management or trading company

__Other (specify):_____

4. Export shipments over the past 12 months:

__0

1 __2

12 __13

50 __51

99 __100+

May we call you about your experience with the ISA service?

Company name: _____ Contact name:

Phone: _____

Thank you

we value your input!

This report is authorized by law (15 U.S.C. 1512 et seq., 15 U.S.C. 171 et seq.). While you are not required to respond, your cooperation is needed to make the results of this evaluation comprehensive, accurate, and timely. Public reporting burden for this collection of information is estimated to average ten minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Reports Clearance Officer, International Trade Administration, Rm. 4001, U.S. Dept. of Commerce, Washington, D.C. 20230, and to the Office of Information and Regulatory Affairs, Office of Management and Budget, Paperwork Reduction Project (0625 0217), Washington, D.C. 20503.

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I (rev. 5/95)

OMB. No. 0625

0217; Expires 12/31/99

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